



# FAMILY INDEPENDENCE ADMINISTRATION

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## POLICY BULLETIN #11-42-OPE

### SENIORWORKS FORM WINRO 462 CALL-INS (FIA-1003 [E])

Date: May 4, 2011	Subtopic(s): Forms
<p> This procedure can now be accessed on the FIAweb.</p> <p>Cases are transferred to Center <b>84</b> when the casehead reaches age 60.</p> <p>Refer to <a href="#">PB #09-99-OPE</a> for seniors with deficient employment quarters.</p>	<p>The purpose of this policy bulletin is to introduce the new WINRO 462 Call-Ins (<b>FIA-1003 [E]</b>) form to Job Center staff in the SeniorWorks Center (Job Center <b>84</b>). The form will be used to monitor the process of assessing a participant's eligibility to apply and qualify for Social Security Administration (SSA) benefits when he/she is 60 years of age or older.</p> <p>The Center Director/Deputy Director:</p> <ul style="list-style-type: none"> <li>• forwards the <b>WINRO462</b> report daily to the designated Eligibility Specialist III (ESIII). This report indicates cases that were transferred to Center <b>84</b>.</li> </ul> <p>Upon receipt of the <b>WINRO462</b> report, the ESIII must:</p> <ul style="list-style-type: none"> <li>• divide the list of participants into two groups based on age and number of quarters of eligible employment.</li> <li>• access the WMS <b>WQQINP</b> (SSA 40 Quarter Inquiry) screen to determine the number of quarters; <ul style="list-style-type: none"> <li>▪ the first group includes participants who are ages 62 or older with 40 quarters of employment, and are immediately eligible to apply for SSA benefits; and</li> <li>▪ the second group includes participants who are ages 60 and older with 35-39 eligible quarters of employment, and are short quarters to qualify for SSA benefits when they turn 62.</li> </ul> </li> </ul> <p>Once the two groups have been identified, complete Form <b>FIA-1003(E)</b> for each group as follows:</p> <ul style="list-style-type: none"> <li>• enter the case name, case number, age and number of quarters of the participant in the appropriate fields;</li> <li>• forward the completed <b>FIA-1003(E)</b> to the Center Director or Deputy Director.</li> </ul>

HAVE QUESTIONS ABOUT THIS PROCEDURE?  
Call 718-557-1313 then press 3 at the prompt followed by 1 or  
send an e-mail to *FIA Call Center Fax* or fax to: (917) 639-0298

The Center Director/Deputy Director will forward the annotated Form **FIA-1003 (E)** to the caseworker;

Upon receipt of the **FIA-1003 (E)** the Caseworker will:

- send the Notice to Report to Center ([M-3g](#)) to participants in the first group currently eligible for SSA benefits, to bring in the SSA award letter or verification that he/she has applied for SSA benefits;
- send the SeniorWorks Appointment Letter ([W-75](#)) to participants in the second group, participants with 35-39 quarters, to set up an appointment with the caseworker who will then refer him/her to an appropriate employment vendor;
- enter the appointment date for participants on Form **FIA-1003(E)**;

When the participant reports for his/her appointment, the caseworker must:

- review documentation to verify that the participant has applied for, or is correctly in receipt of SSA benefits;
- scan and index the documents;
- for participants with fewer than 40 quarters, explain to them the benefit of reaching 40 quarters, and refer them to an appropriate employment vendor;
- for both groups, annotate the “Outcome” field on the respective form **FIA-1003(E)** (examples of outcome are; discussion about employment options because they currently have 35-39 quarters, FTR/FTC appointments, or award letter submitted);
- forward the completed form **FIA-1003(E)** to the Center Director or Deputy Director who will forward the form to the designated ESIII; (for the second group, Form **FIA-1003(E)** is complete with no further action required);

Upon receipt of the completed **FIA-1003 (E)** for the first group, the ESIII must:

- for participants currently in receipt of Social Security benefits, calculate and save a new budget;
  - if the household becomes ineligible, close the case in accordance with current procedure
- annotate the “Action Taken on Case” field on Form **FIA-1003 (E)** (examples of actions taken are; budgeting of income, or case closed due to excess income);
- forward the completed Form **FIA-1003 (E)** to the Center Director or the Deputy Director, and

Refer to [PB #09-99-OPE](#)

Case closings and budget reductions will generate a CNS notice.

The Center Director/Deputy Director will:

- review Form **FIA-1003 (E)** to ensure that all required actions have been taken.

*Effective Immediately*

**References:**

18 NYCRR 351.1(b)(2)(iii), 351.2(e), 352.23(a)  
[TASB](#), Chapter 19, Sections A and Q

**Related Item:**

[PB #09-99-OPE](#)

**Attachment:**

**FIA-1003 (E)**      WINRO462 Call-Ins

☞ Please use Print on Demand to obtain copies of forms.

